

Step One

Step One Charity Gifts in Wills Guide



A gift in your will to Step One Charity can save lives.

What legacy will you leave?

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A message from Step One's Chief Executive Officer, Eilis Rainsford

Step One Charity has been helping people with disabilities and mental health needs from across Devon for nearly 85 years. We have been alongside individuals and their families at every stage of their lives, helping people live with independence and fulfil their potential.

Every day I get to see and hear the difference we make to these lives and this creates an exciting 'to do list' in my head. I am constantly proud of the work we do but, more importantly, I am proud of the possibilities we have in our organisation that we have yet to realise.

As we step into the future, I see that there is a growing capacity for collaborative practice. By building on our foundation, we are able to work alongside others and enact real change, delivering a more unified and effective health and social care system across Devon.

I am honoured that you are considering being a part of this vision by leaving a gift to Step One Charity in your will. Please feel free to call me on the number below as I would love to chat and show you just what a wonderful difference your support could make.



Eilis Rainsford, CEO
Step One Charity
01392 255428

Every day across Step One, gifts in wills are helping to give hope

Who we are

Step One Charity, formerly known as the St Loye's Foundation, merged with the Community Care Trust (CCT) in recognition of the increasing links between support for people with disabilities and/or mental health conditions.

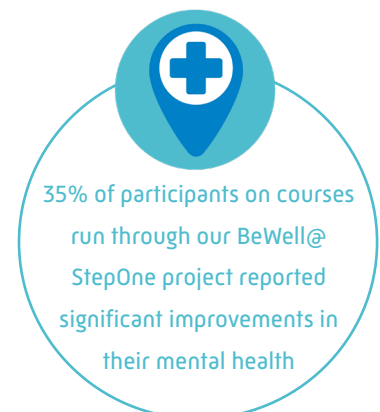
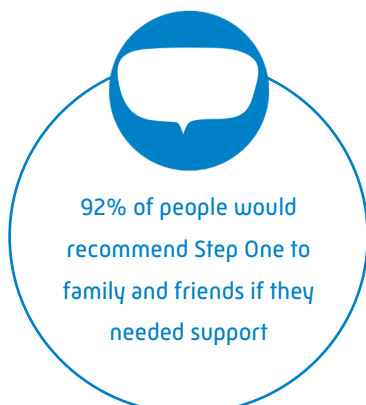
Step One is a Devon-based charity providing residential and community-based services for people with a mental health issue and/or hidden disability. Our Head Office is in Exeter's city centre, and we also have mental health hospital facilities located in Newton Abbot. We work across Devon, supporting Exeter and East Devon, and Torbay and South Devon.



Each week we support around 100 people in Exeter with over 600 support hours, helping them to manage their own wellbeing so that they may take that first step towards living independent and fulfilling lives.

Our services range from providing community-based support and learning opportunities, to specialist acute care facilities for people experiencing a mental health crisis. We work with local people every year to build hope and meaningful connections, and we support people to discover a sense of their own strengths, resilience and potential.

In 2021...



What we do

Cypress Hospital - Mental Health Crisis Support

Cypress Hospital based in Newton Abbot is a short stay, open unit for people who are in or recovering from a mental health crisis. Our dedicated team provides 24/7 nurse-led support. This helps to avoid the need for acute ward admissions and supports people to transition from an acute ward back into their community. The 14-bed unit is accessible to all and working in partnership with community mental health teams, patients and families, the expert multidisciplinary team provides individualised support plans and weekly medical reviews.



Granvue – Mental Health Step Down Support

Granvue provides additional step-down accommodation from Cypress for 2-4 weeks, offering further support with independent living skills or while patients await a package of support in the community. The occupational therapy team delivers a programme of wellbeing and self-management groups, 'working with home treatment teams, recovery coordinators and other medical professionals.



CF03 Project - Her Majesty's Prison and Probation Service (HMPPS)

We run a highly successful CF03 project where our team works meaningfully to engage with people, enabling them to get actively involved with their local communities and access the support options available so they can change their lives for the better and feel more a working part of their of local areas.



Supported Living and Community Support Services

Our specialist team enables anyone over the age of 18 in Devon who has autism spectrum conditions, learning difficulties, mental health concerns or dual diagnosis to live more independently. This is done through providing individually tailored activities and support, allowing individuals to thrive in their communities, gain the confidence and skills to live independently; achieve learning and work skills, and find strategies to grow.



How your gift could help

Every year, gifts left in wills make a big impact on the services we provide. A gift of any size will make a tangible difference towards the 800+ people living in Devon with disabilities and/or mental health problems that we support each year.

Our work is continually developing to meet community needs. In response to the COVID-19 pandemic, and with the aim of meeting the growing

demand for mental health services, Step One launched BeWell@StepOne, an entirely new programme which has been developed specifically to be practical and accessible in a post-pandemic world. This service is entirely funded through voluntary income and it is through donations such as a gift in your will that we have the ability to rapidly adapt, develop, or tailor services to meet community need.



BeWell@StepOne is just one example of how a gift in your will can help Step One to work in collaboration with the NHS to provide innovative, transformative services to support Devon's population with their mental health and wellbeing.

A gift left in your will can offer real opportunities for someone in need. We work closely with Devon County Council and the NHS; however, it is Step One Charity which makes sure that someone living with a disability can go for a day out, or has the space and support to 'develop their life skills, or support them to return home after experiencing a mental health crisis and receiving our 24-hour hospital care.

"Step One has enabled me to stay at home on my own for longer periods with little or no anxiety"

- Service user

How your gift could help

"Really glad I did this.
Excellent facilitation, it has
really helped me, thank
you."

-BeWell@StepOne
Participant



BeWell@StepOne is an accredited online programme which was developed during the pandemic following significant consultation with key stakeholders in the NHS and among participants. This vital programme offers a mix of courses for adults with mental health issues in Devon to learn an assortment of self-management mental health tools, and provides them with the opportunity to join a peer mentor forum to help them manage their mental health

With powerful outcomes such as reduced isolation, increased resilience, confidence, sense of hope and self-esteem for both participants and Peer Mentors, as well as increased employability for Peer Mentors, not to mention reduced admissions to NHS services, BeWell@StepOne is now and will continue to drive transformative change across the mental health support landscape in Devon.

So far, the results have been fantastic, with 83% of participants experiencing a positive step change in their mood according to their wellbeing scale.

"The group that I was with were great. I was
lucky as we all gelled and participated and wanted
to benefit and improve our health and well-
being. We all had different reasons for being on
the course and it worked we were all sensitive
to each other's needs."

-BeWell@StepOne Participant

Gifts In Wills explained

A thoughtful gift, large or small, will help us to continue our vital work. At Step One, every gift, no matter what size, makes a real difference, giving hope and supporting others to live an independent and fulfilled life.

Making a will can mean peace of mind for the future. It can protect your loved ones; ensuring that they are not subjected to additional worry at a time of grief. Leaving a gift to a charity in your will can also help avoid inheritance tax while making a real difference at the same time.

Gifts In Wills Explained

You may be surprised to know that leaving a gift to a charity in your will has many benefits, both to you and to the charity you choose, which is why more and more people are choosing to donate in this way. Not only are you making sure that a charity close to your heart is able to continue their valuable work, you are also reducing your taxable assets, potentially reducing your overall inheritance tax rate.

A gift in a will, or 'legacy' is not taxable, which means that 100% of your gift will go to the charity of your choice. This makes it one of the most effective ways of donating to a charity as there are very limited expenses on either side – especially if you use our 'Will in a Week' (add dates here) opportunity to create a free will!

Where Do I Start?

Making a will is making a promise to the people and places you love, legally. At times, it may seem overwhelming to think about but in practice it can be as simple as 1, 2, 3:



Types of gifts you can leave in a will

There are four main types of gifts you can leave in your will:

A residuary gift –

a percentage of your estate once any specified gifts have been made to friends and family. Many charity supporters choose to leave this type of gift because its value will be dependent on the value of your estate at any given time rather than a set amount

A pecuniary gift –

is a specific amount of money. It's worth bearing in mind that the effects of inflation mean that this type of gift is likely to lose value over time and may end up being less than you initially intend.

A specific gift –

is a gift or a specified item – such as a personal possession, land, buildings or stocks and shares.

A reversionary gift –

You may wish to set up a trust in your will so that someone can enjoy the benefit of some money or property you have during their lifetime. Afterwards, the remaining money or property would then be donated to us.

When you are ready to make your will, and set out your wishes for the future, we hope that you will consider Step One Charity for a donation. If you do, we would love to hear about it and so there is an optional 'Pledge Form' below, which you can use to notify us of your decision (the form does not commit you to your decision, it acts as a notification just to let us know if you have considered us for a gift at this time.)



Patronage

Our Patron

Our patron, Her Majesty the Queen, supported our work from 1946 to 2022.

The Queen became our patron shortly after her first visit to St Loye's (as Step One was formerly known) in 1946, as Princess Royal.

Step One is honoured to have had the continued support of the The Queen, and we have welcomed her on several visits over the years to open facilities and meet our staff.

In her Diamond Jubilee year in 2010, The Queen visited our Exeter offices with His Royal Highness The Duke of Edinburgh.

In 2016 our trustees and fundraising supporters were delighted to attend The Patron's Lunch at The Mall in London. The lunch marked the Queen's 90th birthday, and organisations and charities who enjoy the Queen's patronage were invited to attend the celebration.



Meet Sue, a supporter who has left a gift in her will



Sue's Story

Why did you decide to leave a legacy to Step One?

I've worked amongst Devon's healthcare services for 33 years and over this entire period I've seen Step One go above and beyond to do its incredible work. I've witnessed the real benefits this charity can offer to adults living with disabilities as well as to people experiencing mental health difficulties. That's why, when I think of leaving a gift to charity in my Will, I consider Step One.

What does leaving a legacy mean to you?

What I love about the charity is that it works with people as individuals, seeing them for who they are and supporting them to achieve their own goals over the long-term, whether that be going to work or getting back on their feet after life has turned upside down. In years to come when someone is in crisis, or faces seemingly insurmountable obstacles in their lives, I would like to help Step One be there to offer a lifeline and make a difference.



Frequently Asked Questions

Does Step One Charity really need a gift from me?

Yes we do! Although our core services are commissioned and covered by the local statutory health and social care authorities, we still need to raise more than £200,000 every year to meet the wider need for mental health support. For example, our BeWell@StepOne programme which supports more than 500 people every year, is only possible down to legacies and voluntary donations. Such funding is also vital to ensure that those with a disability or mental health issue can enjoy life-enriching activities and day trips which support a more active life in supported living accommodation.

Will my gift make a difference?

Yes! With your gift we can offer a rich and fulfilling service by providing a variety of life-enhancing activities and tools, such as specialist equipment, redecorating wards, providing sensory items that can help calm anxious patients, day trips for those we support in the community, and providing vital mental health support in people's homes by way of the BeWell@StepOne programme.

Do I need a solicitor?

You can write your own will. However, to ensure it is legally binding and covers everything, we would always recommend a solicitor, as a professionally written will is more likely to accurately convey your wishes after you have gone.

I want to leave a gift to Step One Charity, what are the Charity details?

Firstly, thank you! These are the details you need to include in your will:

Step One Charity
Beaufort House
51 New North Road
Exeter
EX4 4EP

Registered Charity Number: 235434

What if I change my mind?

Including a gift to Step One Charity does not make it a binding commitment while you are still alive. So, you are free to change your mind, and your will, at any time.

What is an Executor?

An Executor is someone (sometimes a friend or family member although it can also be a solicitor) whom you trust to carry out your wishes once you have gone.

Frequently Asked Questions

If I do leave a gift, how will you find out?

Your will is private, and we won't know if you have left us anything unless you choose to tell us – or until the time comes for your will to be read.

However, if you have chosen to leave us a gift, we would love to know so we can thank you and stay in touch in the way that suits you best.

I already have a trusted solicitor. Can I use them to leave a gift?

Yes, you can use your own solicitor to draw up your will. Simply tell them that you would like to leave us a gift and they will arrange the paperwork for you. If you would like this done for free, then check to see if they are on our Free Will list first. You can find our contact details at the back of this pack.

What about inheritance tax?

Leaving a gift to us – or any other charity – may lower your overall Inheritance Tax Liability. If you leave a certain percentage of your estate to charity, you may be eligible to pay a reduced IHT rate. Every case is different, so it is best to speak to your solicitor about it.

I've just written my will. Do I have to go over everything again if I want to leave you a gift?

No. Rather than re-writing everything you can instruct a solicitor to add an amendment to your existing will – which they will then prepare. This is known as a codicil.

What is the process of writing a will?

Most wills are straightforward but it depends on individual circumstances. The process begins with an appointment with your chosen solicitor. Once your wishes have been written, it will then be professionally drafted and sent to you to be signed in the presence of a witness. After signing, the will is usually returned to the solicitor.

Do you offer a Free Will Writing Service?

Yes. Every year we partner with local solicitors who offer a free will writing service for a set period and this will only be for basic wills. We also have an online free will writer who we have ongoing partnership with. Contact us for more information.

Our Legacy Promise

You can change your will at any time by using a codicil - a legal document that should be signed by you, and witnessed by two people. For guidance on amending your will, please contact your legal advisor who can help you with this.

For information on making a will, please visit <http://www.gov.uk/make-will>

Our Promise To You

We believe in making a difference.

Your generosity will help us improve the accessibility of mental health services in Devon.

We care.

A gift from you will be handled cost-effectively, sensitively and respectfully.

We're listen.

If you have any questions about your legacy gift or how we support people with mental health across Devon, you can always get in touch with us.

Pledge form (downloadable from our website)

If you have decided to leave a gift to Step One, we would love to hear from you to express our sincere thanks – please complete this pledge form so we can meet your needs. As per our legacy promise, we also respect that this can be a private decision in which case there is no need to inform us.

1. My details

Title:..... First name:.....

Surname:.....

Full Home Address:.....

.....

.....Postcode:.....

Contact number:.....

Email:.....

2. Legacy details

I have left a gift to Step One in my will ☐

I plan to leave a gift to Step One in my will ☐

Please send me a copy of your free will info ☐

I would like to talk to someone about leaving a gift to Step One in my will ☐

3. Tick the boxes below to indicate how you would prefer to hear from us:

Step One Charity would like to keep you updated on information that may be of interest to you. Hear about our latest news, campaigns and how you can support our aims.

Would you like to hear from us by email? ☐ Yes ☐ No

Would you like to hear from us by text message? ☐ Yes ☐ No

Would you like to hear from us by post? ☐ Yes ☐ No

Would you like to hear from us by phone? ☐ Yes ☐ No

By ticking the above box(es) you agree to us recording your details on our database. We may contact you from time to time to tell you about how you can get involved with fundraising opportunities for Step One. Your details will be kept securely. We promise never to sell or share your data with any third party for marketing purposes. You can read our full privacy policy at www.steponecharity.co.uk. You can change your mind about how you prefer to be contacted at any time by contacting us on carey.mackenzie@steponecharity.co.uk or call 01392 255428.

“Step One has encouraged me to have more control over my life”

– Step One Quality Account 2019/20

Thank you kindly for your support.

Have any questions?

If you'd like to include Step One Charity in your will, please call us on 01392 255428 or email us via fundraising@steponecharity.co.uk

Step One Charity
Beaufort House
51 New North Road
Exeter
EX4 4EP

We are Devon's mental health charity



Step One is a Charity and Company Limited by Guarantee; registered in England and Wales. Registered charity number: 235434; Company number: 393477.